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Voluntary - Public

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Netherlands

Post: The Hague

Benelux Potato Products Report Voluntary

Report Categories:

Potatoes and Potato Products

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Report Highlights:

2009 ware potato production in Belgium and the Netherlands is expected to increase 2 percent over 2008, despite unfavorable growing conditions. Since 2008 ware potato production was somewhat lower than previous year, production of processed potato products is estimated to be down slightly.

Note: Official figures for the 2009 harvest will not be released until the end of the year. Post will update this report then.

General Information:

Europe

The North-Western European Potato Growers (NEPG) represents growers in Belgium, France, Germany, the Netherlands and the United Kingdom. Based on conversations with NEPG and industry specialists, Post expects that the five-country harvest will be lower than last year by about 1%.

Table 1: Potato (ware potatoes) production in 5 potato growing countries, in MT

year	2005	2006	2007	2008	2009 e/
Belgium	2,722,484	2,530,598	3,126,039	2,864,250	3,050,000
Germany	7,424,500	6,334,200	7,930,790	7,296,000	6,930,000
France	4,449,750	4,410,000	4,606,800	4,380,600	4,447,800
The Netherlands	3,300,000	3,105,000	3,608,707	3,520,163	3,450,000
The UK	5,091,951	4,756,242	4,555,220	5,062,280	5,104,310
Total	22,988,685	21,136,040	23,827,556	23,123,293	22,982,110

Source: NEPG

e/ FAS/The Hague estimates

In most countries, yields are down due to unfavorable growing conditions, specifically severe droughty conditions. Belgium reported the greatest reduction in yields. Only the UK expects the same yield as last year. Countries that show production increases did so by increasing area harvested.

Table 2: Potato (ware potatoes) harvest area in 5 potato growing countries, in hectares

year	2005	2006	2007	2008	2009 e/
Belgium	62,501	64,685	65,402	61,516	71,414
Germany	155,000	153,000	169,100	160,000	157,500
France	104,700	105,000	104,700	104,300	105,900
The Netherlands	66,000	69,000	72,464	69,300	69,000
The UK	105,686	106,978	108,200	108,400	109,300
Total	493,887	498,663	519,866	503,516	513,114

Source: NEPG

e/ FAS/The Hague estimates

The continuing drought is causing further problems such as delayed harvesting in Belgium. The drought is also causing higher dry matter content which may cause problems during the harvest and storage.

Belgium and the Netherlands are principal suppliers to the potato processing industry. Germany, the UK and France not only have a much larger domestic consumer market, their exports are traditionally more focused on the fresh market.

Belgium

This year's potato harvest in Belgium is estimated to be 3.0 million MT, an average amount. Producers offset the expected lower yield by a 12% increase in acreage.

In 2008, potato plants in Belgium processed almost 2.7 million MT of potatoes, yielding 1.3 MMT of product. The output of pre-fried potato products totaled 909 thousand MT (product weight). The pre-fried potato products industry in both the Netherlands and Belgium is strongly focused on export markets.

Table 3: Output of Potato Products, 1,000 MT

	CY 04	CY 05	CY 06	CY 07	CY 08	CY 09 e/
Pre-fried products	596	620	651	771	909	810
Other products	427	459	497	497	438	490

Total potato products	1,023	1,079	1,148	1,268	1,347	1,300
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Source: Belgapom Belgian potato trade and processing organization

e/ FAS/The Hague estimates

Netherlands

Total production of potatoes for 2009 is estimated to be 3.45 million MT, down 2% from the previous year. Of the total production, almost a third is destined for the fresh market and the remainder finds its way to the processing industry.

In Marketing Year [1] 2008/2009 (MY 08/09), almost 2.3 million MT were used for further processing. In addition, 1.0 MMT of potatoes were imported, mainly from neighboring countries, to fully utilize processing capacity. As a result, production remained essentially unchanged.

Table 4: Output of Potato Products, 1,000 MT

	MY 04/05	MY 05/06	MY 06/07	MY 07/08	MY 08/09
Pre-fried products	1,371	1,380	1,275	1,356	1,370
Other products	353	346	371	404	387
Total potato products	1,724	1,726	1,646	1,760	1,757

Source: Product Board Arable Farming

Previous reports from FAS/The Hague on potatoes and products can be found on

<http://www.fas.usda.gov/scripts/attacherep/default.asp>. Below you will find a selection of these reports from FAS/The Hague.

Report Number	Report Title	Date Released
NL8025	Frozen Potato Products	11/20/2008
NL8002	Frozen Potato Products	01/23/2008
NL6045	Frozen Potato Products	12/05/2006
NL6038	Frozen Potato Products	10/10/2006
NL5031	Frozen Potato Products	10/03/2005

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[1] Marketing years run from July until June